What makes an excellent teaching note?
Guidance for case writers

Teaching notes are a useful tool for instructors adopting cases in their classes since they present one or more ideal scenarios as to how class sessions may be structured. However, very often even strong cases submitted to the oikos Case Writing Competition are accompanied by rather weak teaching notes. To remedy this situation, we provide some guidance to case writers as to the content of an excellent teaching note.

A best practice example of a teaching note for the case by Michael V. Russo and Dan Goldstein, Seventh Generation: Balancing Customer Expectations with Supply Chain Realities, which won the 1st prize in the 2007 oikos Case Writing Competition, can be downloaded here.

Taking examples from this teaching note, we illustrate recommendations by John Heath in The Case Teaching Note, published by echr (UK and USA).

1. **Summary of the case** A teaching note should include a brief summary of the case. Make it appealing to sell the case. Be sure to orient instructors to the main issues or problems to be resolved in the case.

2. **Teaching objectives and target audience** Teaching objectives should be clearly defined and the target audience specified (undergraduate/graduate students, MBA students? In which subject?). A sample teaching objective follows:
   “This case can be used to illustrate and discuss a number of important issues for environmentally-oriented businesses. <...> In addition, the case provides a set-up to a meeting where a choice from among clearly-defined alternatives must be made.”

3. **Teaching approach and strategy** A teaching note should include suggestions for instructors as to how exactly the case can be used in the classroom or for homework assignment, exam or case competition alternatives. It may include questions for discussion, suggestions for individual/group work and timings for the session. For example:
   “This meeting can be used to enter into a role-play, where students can represent the viewpoints of individuals present. <...> Depending on how comprehensively the instructor wishes to discuss the case, how much of the video is shown, and how extensive and lengthy is the role-play, this case can run from a single 80-minute session to two such sessions. <...> Instructors may assign discussion questions, including these: 1) What’s behind the rise in the environmentally-sensitive
segment of the household nondurable goods industry? 2) How does a values-driven strategy add costs to products? <...>”

4. **Analysis** A teaching note should provide comprehensive answers to all suggested questions and the analysis should be as thorough as one would expect from advanced students in the class.

“So how does the “values-driven” strategy add costs? It is worth spending some time in the classroom to discuss how operating a values-driven company like Seventh Generation can inflate costs. It’s important to get these items out, because one of the points that the instructor will want to develop is that for many of these companies the higher costs are easier to identify than the marketplace benefits. Some of the cost-inflating elements of a strategy like Seventh Generation’s are: 1) Ingredients that can be more expensive; 2) Generous benefits for workers. <...>”

5. **Additional readings or references** It is also important that a teaching note includes suggestions for readings prior to class to ensure that all students are well prepared to discuss the questions raised in the case. It may also be useful to include in the teaching note additional information which can be accessed online, e.g. company websites or YouTube videos.

6. **Variations of teaching methods** A teaching note may also include some suggestions as to the variations in teaching methods and questions, depending on the course where the case is used and the level of students.

“The video segment <...> (“Green Chemistry: A Technical Example) is accessible to a wide range of students but will be especially helpful to chemists who can understand the technical terms that he uses. The hope is that scientists can use the case to create another frame through which to view Seventh Generation and its decision on baby wipes.”

“Optional Role-Play: <...> the instructor can ask students to play all of the Seventh Generation staffers that were at the baby wipes meeting. (It’s actually optional to include Hollender, as he is described as being silent during the meeting. In addition, his decision is probably best left as a class decision point). A role-play like this is aided if students playing roles can be brought to the front of class, each with a name tent that shows their name and position in the company.”

It goes without saying that an excellent teaching note is based on the actual teaching of the case in the classroom. Only then is a teaching note able to present guidance for others in a meaningful way. It is best to observe someone else teaching your case so you can see where the gaps in information lie, and rewrite the case to fill them, or reorient the questions.
Finally, there is no optimal length for a teaching note. A teaching note should be comprehensive enough to be a useful teaching tool but it should not be too long either. As a rule of thumb, case writers should be aiming not to exceed about 10 pages.

These recommendations are based on John Heath, *The Case Teaching Note*, published by eech, UK and USA. Examples are derived from a teaching note by Michael V. Russo and Dan Goldstein for the case *Seventh Generation: Balancing Customer Expectations with Supply Chain Realities* which won the 1st prize in the 2007 oikos Case Writing Competition.

Recommended reading: